MEMORANDUM FOR: Chief, Engineering Group
                      Chief, Development Group
                      Chief, Customer Service Group
                      Chief, Management Group
                      Chief, Operations Group
                      Chief, Consolidated SAFE Program Office

FROM: Chairman, Career Service Board

SUBJECT: Annual Performance Awards for the Intelligence
                      Secretary Program (IS-01 through IS-04 Grade Levels)

    1. The following individuals have been appointed to serve on the MI/MZ IS-01 through IS-04 Intelligence Secretarial Evaluation Panel for FY 1988:

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                                                   Chairperson
                                                   Member
                                                   Member
  Member
  Member
  Personnel Advisor

    2. For this annual review of all MI and MZ secretaries at grade levels IS-01 through IS-04, a Secretarial Performance Award Nomination Worksheet should be submitted on each employee indicating the Supervisor and Group Chief's recommendation for or against an award. Each Group's recommendations for Performance Awards should be prioritized by IS grade. Please ensure that those employees who are on a rotational assignment outside of the main office for whom you are responsible have also been considered for an award. To assist you, attached is a listing of all IS-01 through IS-04 employees assigned to each group (Attachment A) and corresponding Secretarial Performance Award Nomination Worksheets for each employee.

    3. For your information, revisions to the Intelligence Secretarial Program based on an evaluation of its first year as well as ideas and suggestions from the secretaries themselves led to a series of recommendations from the chairpersons of the five Career Service Secretarial Panels. These recommendations were approved by the Executive Director on 28 October 1987. The attached memorandum (Attachment B) describes the changes in detail. In brief, they are as follows:

        a. <u>Training</u>: The Office of Training and Education has revamped the curriculum by reducing the required number of days of training from 44 to 32, and revising several courses.

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b. <u>Performance Awards</u>: Four key changes were made in this area. First, IS-01 secretaries will now be eligible for Performance Awards. Second, Performance Awards for IS-03 secretaries will be approved at the Office via Directorate level. Third, IS-03 secretaries will be eligible for higher amounts than IS-02 secretaries. Fourth, instead of a fixed amount, a Performance Award will be a percentage of the secretary's salary. The percentages are set at ten percent for IS-04, eight percent for IS-03, and five and three percent for IS-02 and IS-01 respectively.

c. <u>Time-in-Level</u>: Time-in-level guidelines for promotion to the next level were reduced to one year at IS-01, two years at IS-02, and three years at IS-03. Accelerated promotions are still possible at the discretion of the Head of the Career Service.

d. <u>Promotions</u>: IS promotions will represent a minimum of three increments instead of two. Secretaries previously promoted in the IS System will have their salaries adjusted from 8 November 1987 onward if they received less than three increments when they were promoted.

4. The requested performance award nomination should be received by Chief, OIT Personnel by NLT COB <u>8 January 1988</u>, as the Panel will be meeting early/mid January 1988. The formal written findings are due to Director of Information Technology by <u>late January 1988</u> and the Deputy Director for Administration by 12 February 1988.

5. As a final note pertaining to the 1988 Secretarial Performance Award exercise, please ensure that a worksheet is prepared on every secretary. It is imperative that a current Performance Appraisal Report (PAR) be attached to each Performance Award Nomination Worksheet for all secretaries. The PARs for secretaries are due according to the following schedule:

Level	For Period Ending
IS-01	31 March
IS-02	30 November
IS-03	31 December
IS-04	31 December

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Attachments as stated:
    A. IS Employees Assigned to Each OIT Group
    B. Secretarial System Revisions

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OP- 87-1086

19 October 1987

MEMORANDUM FOR: Executive Director

VIA: Deputy Director for Administration
                  Director of Personnel

25X1   FROM:

                  Deputy Director of Personnel for
                  Compensation, Automation and Planning

SUBJECT: Secretarial System Revisions

1. We now have completed the first year of the Intelligence Secretary System (IS) and it appears to be working well. We were successful in our initial job enrichment efforts. Prior to converting to the system, the Agency had approximately ____ secretarial positions at GS-08 and above. We now have more than double-that number at the IS-03 and IS-04 levels. Second, the amount of training received by our secretaries has more than doubled. Third, we are better able to recognize outstanding performance through our awards program.

2. Despite these achievements, at the completion of the first performance award and promotion cycles, we undertook an extensive review of the system. This effort included soliciting written comments and suggestions from secretaries and managers and conducting a series of meetings with secretaries to discuss how the new system was working and how it could be improved. We also had our consultant review the system. The verdict was that while there had been some significant accomplishments, there still were some areas where improvements and enhancements were needed. The results of the staff and consultant review of the system were compared with informal reviews undertaken by the chairpersons of the five career service secretarial panels. The panel chairpersons met on a couple of occasions to discuss the issues that had been raised by both secretaries and managers. Their recommendations on improving the system are as indicated below:

Issue 1: Training. A number of concerns were expressed about the availability of training, duplication and overlap in some courses, and the appropriateness of course material. Accordingly, the Office of Training and Education did a complete zero-based review of the training requirements, shared the results with the secretarial panel chairpersons, and, after receiving favorable comment, implemented changes that include the following:

° Reduce from 44 to 32 the number of required days of training.

° Condense into one course, "Time Management," "Stress Management," and "Getting Your Ideas Across."

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° Drop the "Career Management Workshop" from the secretarial curriculum.

° Require "Professionalism in the Office" at the IS-01 rather than the IS-02 level.

° Establish "Women in the Work Force" as a recommended course at the IS-02 level rather than as a required course at the IS-03 level.

° Establish "Intelligence Issues" as a recommended course at the IS-03 level as well as the IS-04 level.

Issue 2: Performance Awards. After completion of the award cycle there was considerable interest among both secretaries and managers in improving the fairness of the awards program that resulted in the following recomendations:

a. Awards for IS-01: The first concern is that secretaries at the IS-01 level are not eligible for performance awards. New secretaries hired at either IS-01 or IS-02 can receive two increments a year for the first two years. However, while IS-02 secretaries also can receive performance awards, if warranted, IS-01 secretaries cannot. There is no clear reason why IS-01 secretaries are excluded from consideration; and it is recommended, therefore, that IS-01s be eligible to receive performance awards, and these awards will be handled by component-level panels.

APPROVED (X)   DISAPPROVED ( )

b. Awards for IS-02 and IS-03: There is concern among secretaries and managers that, given the difference between the responsibilities of IS-02 and IS-03 secretaries, they should not receive the same size awards. It is recommended that IS-03s be eligible for a larger award than IS-02s.

APPROVED (X)   DISAPPROVED ( )

c. Award Pool: In the first year, the award budget was structured to allow 30 percent of the IS-02 secretaries to receive a $1000 award, 30 percent of the IS-03s to receive $1000, and 30 percent of the IS-04s to receive $2000 or $3000. If you approve recommendations "a" and "b" above, it is recommended that the awards be budgeted at $500 for IS-01s, $1000 for IS-02s, $2000 for IS-03s and $3000 for IS-04s, again to allow 30 percent of the secretaries at each level to receive an award. These dollar amounts represent an average of three percent of salary for IS-01 secretaries, five percent for IS-02s, eight percent for IS-03s, and ten percent for IS-04s.

APPROVED (X)   DISAPPROVED ( )

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d. <u>Award Amounts:</u> In the first year, the awards given were a fixed dollar amount. There was considerable discussion as to whether this should be changed from a fixed amount to a dollar range in order to give the secretarial panels additional flexibility to discriminate between performance levels. The majority of the secretarial panel chairpersons rejected this approach as injecting unnecessary complexity into the process. A second idea was to give a fixed <u>percent</u> of salary. This was believed to be fair in that it gave greater recognition to more experienced secretaries at the higher salary ranges within each IS level. This proposal was approved unanimously by the chairpersons. It is recommended, therefore, that IS-01 performance awards be based on three percent of salary, IS-02 awards be based on five percent of salary, IS-03 awards be based on eight percent of salary, and IS-04 awards be based on ten percent of salary.

APPROVED (X) .   DISAPPROVED ( )

e. <u>Part-time Secretaries:</u> Many secretaries are of the view that there should be separate award pools for part-time and full-time secretaries to ensure that part-time secretaries get a fair share of the awards. (Last year only 14 percent of the part-time secretaries were given an award.) The managers, for the most part, felt that all secretaries should be ranked one against the other and that it would be unfair for either part-time or full-time secretaries to have awards reserved for them at the expense of other secretaries with better performance records. After considerable discussion, the secretarial panel chairpersons concluded that separate award pools would unnecessarily limit the flexibility needed in the system to assure that the most deserving secretaries are rewarded, regardless of their status. It is recommended, therefore, that there not be separate award pools for part-time and for full-time secretaries. However, the Office of Personnel will continue to monitor the process to ensure equitable treatment.

APPROVED (X)   DISAPPROVED ( )

f. <u>Delegation of IS-03 Performance Award Approvals to Office Level:</u> There was concern among the managers that approval of IS-03 secretarial awards by Directorate-level panels was a poor idea. Indeed, there was unanimous agreement among the secretarial panel chairpersons that IS-03 performance awards should be approved at the Office level, where panels have greater familiarity with the contributions meriting an award. It also was agreed that the percentage of IS-03 secretaries eligible for an award be rounded to the nearest whole number at the Office level, rather than as is currently done at the Directorate-level.

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Issue 3: Shorthand. The shorthand requirement for promotion to IS-04 has continued to be controversial among both secretaries and managers. On the one hand, there are many managers who do not take advantage of their secretary's shorthand skills, and some of the relevant literature suggests that the use of dictating equipment—rather than shorthand—is more efficient and the way of the future. On the other hand, many managers do require shorthand, and secretarial schools—which previously had phased out shorthand training—have recently reinstituted shorthand courses because it is not only used for standard dictation of memos, but also to record instructions, take notes at meetings, record information from telephone calls, etc. Given the unsettled state of affairs concerning the future of shorthand, there was little support for changing the shorthand requirement at this time. It was the view of the majority of chairpersons that our executive secretaries should have this skill so that they are equipped to operate in a wide variety of executive secretarial positions. There also was discussion of awarding money for shorthand, such as is done in the Language Incentive Program, or by giving shorthand qualified secretaries an additional step increase. However, there was little support for such an approach at this time. Accordingly, it is recommended that the shorthand requirement be retained for the next year and that the issue be revisited after the next promotion and award cycle.

APPROVED (X)   DISAPPROVED ( )

Issue 4: Promotions.

a. Time-in-Level Guidelines: Both managers and secretaries expressed concern about the long time-in-level guidelines, i.e. two years to be promoted from IS-01 to IS-02, three years to be promoted from IS-02 to IS-03, and five years to be promoted from IS-03 to IS-04. There is a perception that these times are far longer than comparable guidelines under the GS. The larger point, however, is that promotions between levels should be more a function of skills and performance and less of time—in order to avoid inhibiting the promotion of secretaries who more rapidly demonstrate an ability to perform at the higher levels. It was the unanimous opinion of the chairpersons that the time-in-level guideline for promotion from IS-01 to IS-02 be changed from two years to one year, and that the time-in-level guideline for promotion to IS-04 be changed from five years to three years. However, there was considerable discussion regarding the guidelines for promotion from IS-02 to IS-03. Some felt strongly that this is the most significant advancement for secretaries and that time-in-level guidelines should be kept at three years, but the majority supported this guideline being lowered to two years. Therefore, it is recommended that the time-in-level guidelines for promotion be changed to one year for promotion to IS-02, two years for promotion to IS-03, and three years for promotion to IS-04.

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    b. Value of the Promotion: Under the GS system a promotion is based on a minimum of two steps, each worth about three percent. In the IS system, however, a promotion is based on two increments worth two percent each. Our outside consultant has suggested that we change this, and it is recommended that a promotion in the IS system be based on a minimum of three increments currently worth six percent, bringing the IS and GS promotions into line. It is further recommended that eligible IS secretaries who already have been promoted under the IS system have their salaries adjusted in accordance with this policy as of the date of approval in order to maintain equity.
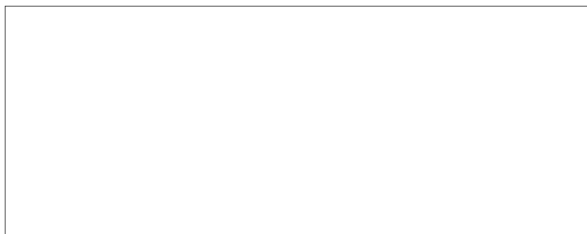
        APPROVED (X)   DISAPPROVED ( )

    Issue 5: Quality Step Increase (QSI). A number of secretaries and managers felt that the QSI should still be available to secretaries. However, because of the outyear cost implications of the QSI, and because it is too early to tell what changes will be made in the overall Agency pay structure, it is our recommendation that the QSI not be introduced into the secretarial system at this time, but that this issue be reviewed next year.

        APPROVED (X)   DISAPPROVED ( )

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SUBJECT: Secretarial System Revisions

CONCUR:

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Director of Personnel

Oct 19 1987

Date

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Deputy Director for Administration

Oct 26, 87

Date

APPROVED:

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Executive Director

28 Oct 1987

Date